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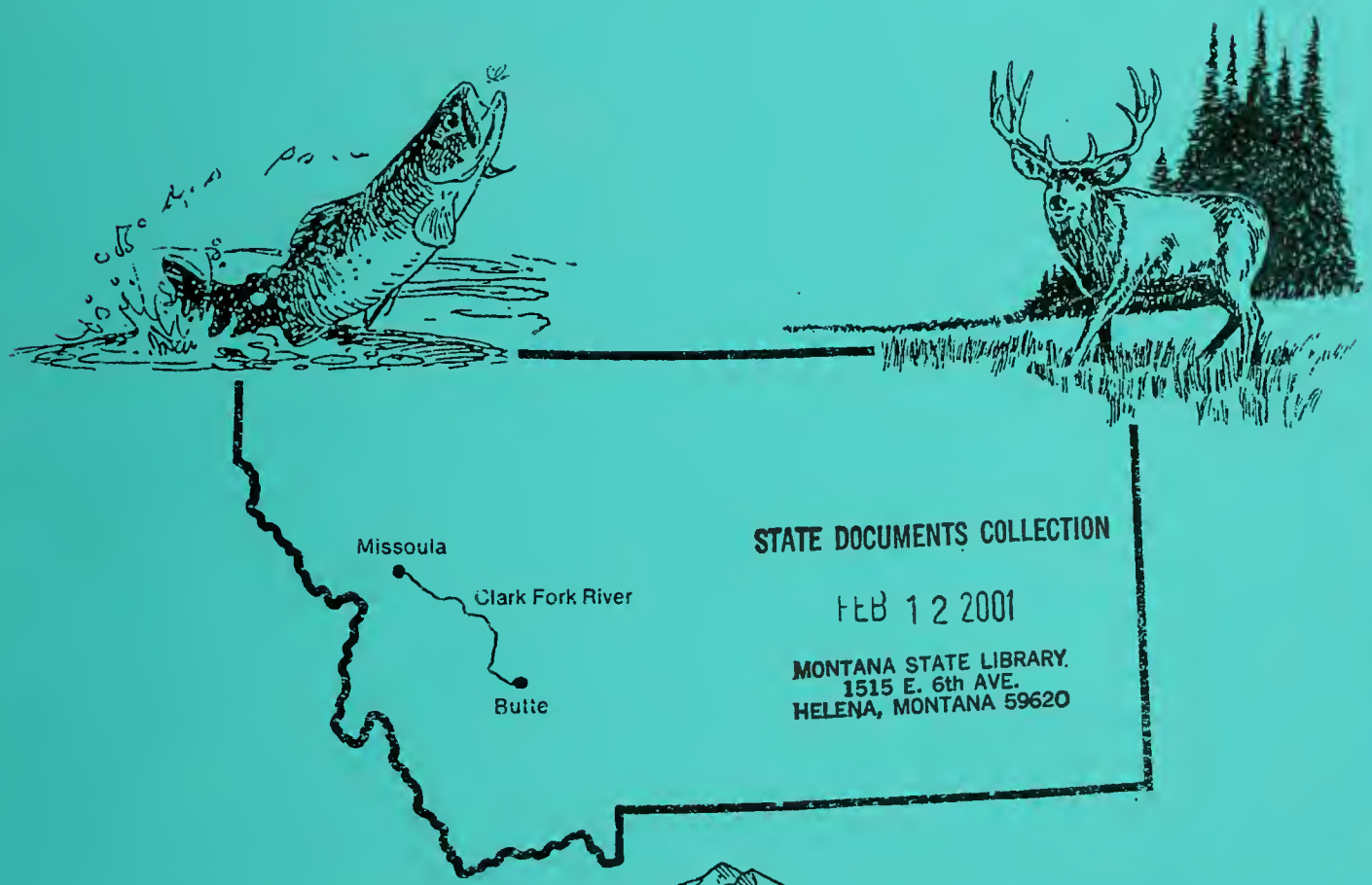
THE UPPER CLARK FORK RIVER BASIN RESTORATION FUND

INSTRUCTIONS AND FORMS FOR GRANT APPLICATIONS
For
PILOT YEAR 2000 GRANT CYCLE



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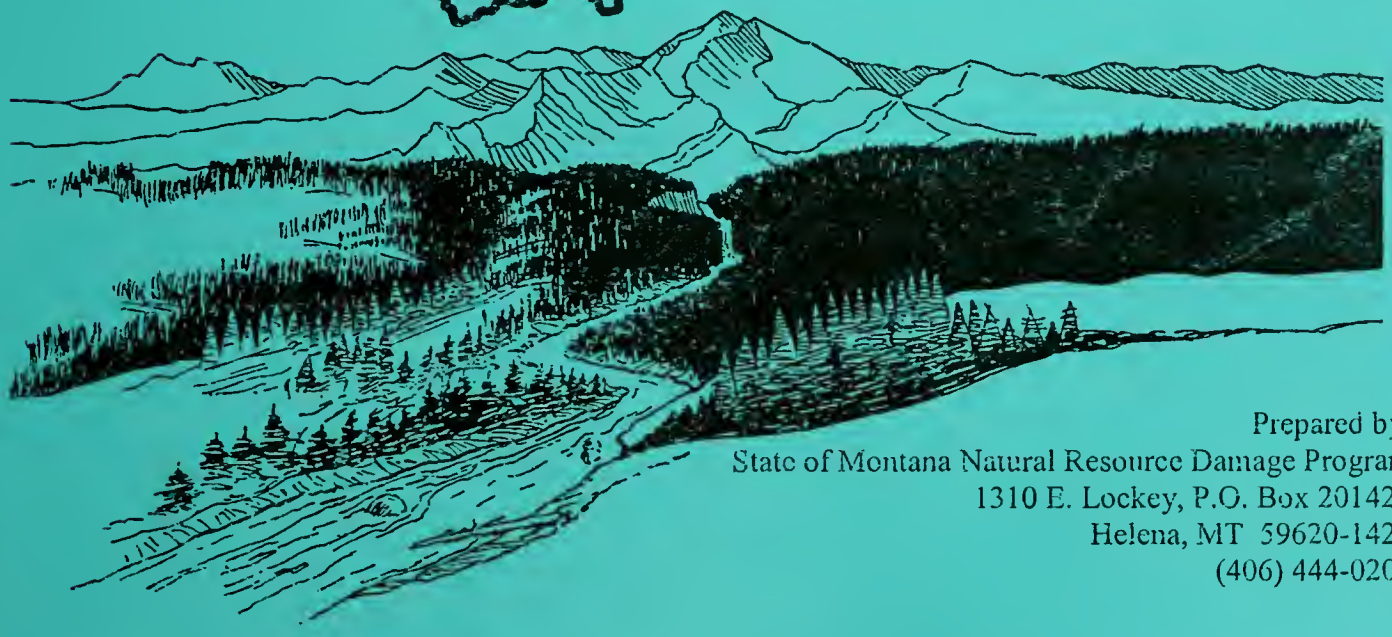

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TABLE OF CONTENTS

SECTION 1 – Overview of Upper Clark Fork River Restoration Fund Grants Program .. 1

Introduction 1
Application Submittal 2
Application Deadline 2
Applicant Eligibility 2
Project Eligibility 3
Project type eligibility 3
Project location eligibility 3
Special Pilot Year 2000 Limitations 3
Funding Selection Process 3
Initial Application Screening 4
Application Ranking and Evaluation 4
Applicant Responsibilities 5
Pre-Applications 5

SECTION 2 - Instructions for Completing Upper Clark Fork River Restoration Fund Grant Applications 6

Step 1. Applicant Information and Project Summary Form 7
Step 2. Proposal Abstract 10
Step 3. Technical Narrative 11
Step 4. Environmental and Human Health and Safety Impact Narrative 14
Step 5. Criteria Statements 17
Step 6. Proposal Budget 19
Budget Forms for UCFRB Restoration Funds Grant 22

APPENDIX A – Supplemental Materials 26

Definitions 26
Detailed Instructions for Criteria Statements 28

ACRONYM GUIDE

ARCO	**Atlantic Richfield Company**
DOI	**Department of Interior**
EPA	**Environmental Protection Agency**
NRDP	**Natural Resource Damage Program**
Tribes	**Confederated Salish and Kootenai Tribes**
UCFRB	**Upper Clark Fork River Basin**

Section 1 – Overview of the Upper Clark Fork River Restoration Fund Grants Program

INTRODUCTION

Mining and mineral processing operations, centered in and around Butte and Anaconda, caused the release of substantial quantities of hazardous substances into the Upper Clark Fork River Basin, resulting in extensive injuries to the natural resources in the area. The Upper Clark Fork River Basin ("UCFRB") refers to that portion of the watershed of the Clark Fork River extending from its headwaters, surrounding the city of Butte, downstream to and including the Milltown Reservoir just upstream of the city of Missoula. The Upper Clark Fork River Basin Restoration Fund ("UCFRB Restoration Fund") was established as a result of a partial settlement of claims asserted in a lawsuit filed by the State of Montana against the Atlantic Richfield Company ("ARCO") seeking damages for injury to natural resources in the UCFRB. The UCFRB Restoration Fund contains no Montana taxpayer funds, is administered by the Governor of Montana as trustee for natural resources of the State, and is established to finance projects designed to restore, rehabilitate, replace, or acquire the equivalent of the injured natural resources of the UCFRB.

This booklet contains the materials necessary to apply for an UCFRB Restoration Fund Grants, including Project Development Grants, exceeding $10,000. For applicants requesting $10,000.00 or less, a separate, abbreviated application booklet, the Short-Form, is available on the Department of Justice website at **www.doj.state.mt.us** or upon request from the Natural Resource Damage Program (406-444-0205).

Included in this booklet for grant applications over $10,000 are:

- **Section 1 – An Overview of the UCFRB Restoration Fund Grants Program that summarizes application submittal requirements and review processes**
- **Section 2 - Instructions for Completing and Submitting UCFRB Fund Grant Applications that specifies the steps for completing an application**
- **An "Applicant Information and Project Summary Form" to be filled out by all applicants and attached to the front of the completed application**
- **Instructions for completing Technical Narrative**
- **Instructions for completing Environmental and Human Health and Safety Narrative and Checklists**
- **Instructions for completing Proposal Budget Estimate Forms and Budget Narrative**
- **An Appendix providing useful definitions and further details on what applicants should address in criteria statements**

These materials are based on the procedures and criteria for expenditures of the UCFRB Restoration Fund set out in the State's *UCFRB Restoration Plan Procedures and Criteria* document (February 2000). Applicants are encouraged to consult that document in seeking additional background on the injured natural resources, project requirements, and funding selection process. This document is available upon request from the Natural Resource Damage Program office in Helena, on the Department of Justice website, or in the Butte, Anaconda, Helena, Deer Lodge, and Missoula libraries.

APPLICATION SUBMITTAL

Applicants should submit **the original and four (4) additional copies** of your application, including copies of all supporting documentation to:

State of Montana
Natural Resource Damage Program
Old Livestock Building
1310 E. Lockey Avenue
P.O. Box 201425
Helena, MT 59620-1425

Phone: (406) 444-0205

APPLICATION DEADLINES

1. **Restoration Project Grants**: The State will begin accepting applications for Pilot Year 2000 restoration project funding on March 1, 2000. Application forms must be **delivered to the Natural Resource Damage Program or postmarked no later than April 14, 2000.** If you have questions, or if the Natural Resource Damage Program ("NRDP") staff can help you in any way, please contact the NRDP office at (406) 444-0205.

2. **Project Development Grants**: The application process for project development grants is "open-cycle." There is no application deadline, and applications are considered on a first come first serve basis.

APPLICANT ELIGIBILITY

Governmental entities, private individuals who are U.S. citizens, and private entities are eligible to apply for UCFRB Restoration Fund Grants.

PROJECT ELIGIBILITY

Project type eligibility: Three types of projects are eligible for UCFRB grant funding:

1. Restoration Projects that will restore, rehabilitate, replace, or acquire the equivalent of injured natural resources and/or the services lost as a result of releases of hazardous substances by ARCO or its predecessors that were the subject of the Montana v. ARCO lawsuit (refer to Appendix A for further explanation of these types of projects).

2. Planning projects that involve developing future grant proposals. Funding for project development grants is to designed to promote the development of project proposals from entities that have sound restoration ideas but do not have funds available to develop those ideas.

3. Monitoring and Research projects that pertain to restoration of natural resources in the UCFRB.

Project location eligibility: During the Pilot Year 2000 Grant Cycle, only projects that would be located in the UCFRB or projects that would restore native trout in the Big Blackfoot River Drainage are eligible for funding. Activities associated with research projects do not have to occur within the UCFRB, provided the proposed research project pertains to injured natural resources in the UCFRB.

PILOT YEAR GRANT CYCLE 2000 LIMITATIONS

The following restrictions apply to the Pilot Year 2000 Grant Cycle given the uncertainties that exist with start-up of a grant program, with on-going natural resource damage litigation, and pending Superfund remedy decisions.

1. Funding will be limited to a maximum of $7.0 million from the UCFRB Restoration Fund.

2. The number of approved projects will be limited to a maximum of ten to twenty.

3. Applicants must demonstrate why their proposals should be funded during the pilot year and why there is good reason their proposals cannot wait for funding in following years.

FUNDING SELECTION PROCESS

This section describes the framework set out in the *UCFRB Restoration Plan Procedures and Criteria* document on how the State, in consultation with other governmental entities, the UCFRB Remediation and Restoration Education Advisory Council, and the general public, will make funding decisions.

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http://www.archive.org/details/upperclarkforkri2000mont

Initial Application Screening: NRDP will screen applications for the following minimum qualifications in addition to the applicant and project eligibility requirements (pp 2-3):

- That the application is completed fully and accurately, and contains all necessary information.
- That the applicant has the ability, financial wherewithal, and other qualifications necessary to undertake the proposed project
- That the projected cost of the project as estimated by the applicant is a reasonable approximation of the project's costs.
- That the applicant has successfully demonstrated why their proposal should not wait for funding in subsequent years. (This screening criterion is a specific restriction for the Pilot Year 2000 Grant Cycle.)

If the NRDP determines a project does not meet the minimum qualifications for funding, the applicant, within 15 days of written notice of this determination, may appeal the determination to the Trustee Restoration Council.

Application Ranking and Evaluation

The *UCFRB Restoration Plan Procedures and Criteria* document details the criteria the State will use to evaluate and rank proposals for funding. Those criteria are generally grouped as follows:

- 9 General Legal Criteria derived from natural resource damage legal requirements
- 8 General Policy Criteria that reflect the State's restoration goals and policies
- 5 criteria specific to land acquisition projects
- 2 criteria specific to monitoring and research projects

For a complete discussion of the criteria used for evaluation and ranking grant applications, please refer to Step 5 (Criteria Statements) on p. 17.

A ranking team will assess the degree to which proposed projects meet each criterion. Then the applications will be ranked against each other. While no particular criterion is necessarily weighted more heavily than any other, a single criterion could be the deciding factor as to whether a project is approved or disapproved, depending on the circumstances. For example, one of the criteria is an evaluation of the project's effects on human health and safety. If a project posed a significant threat of bodily harm to workers or the public, it is likely that the project would be disapproved on this ground alone, irrespective of any other benefits accruing from the project.

In consultation with various governmental entities and the UCFRB Restoration and Remediation Education Advisory Council, NRDP will prepare draft funding recommendations for consideration by the Trustee Restoration Council. Based on public comment and input from various entities throughout the funding selection process, the Trustee Restoration Council will

make recommendations to the Governor. A final funding decision is expected in December 2000.

Funding for project development grants will be considered separately from restoration grant proposals on a continuing basis. In consultation with various governmental entities and the UCFRB Restoration and Remediation Advisory Council, NRDP will make project development funding recommendations to the Trustee Restoration Council. Funding recommendations will be based on criteria specified in the *UCFRB Restoration Plan and Procedures and Criteria* document and on the consideration of whether the project will be implemented without project development funds.

APPLICANT RESPONSIBILITIES

If a project is approved, the applicant must enter into a grant agreement with NRDP before any funds will be received. The agreement will be negotiated after the Governor approves a project. Detailed scopes of works and budgets are required in all agreements, and must be approved by NRDP before work begins on the project.

Grant recipients must obtain all necessary insurance, work permits and work authorizations and follow State contracting and procurement laws, including State laws on contracting and bid procedures for construction projects. Grant recipients must keep accurate financial records and documentation for audits. The NRDP can provide information about these requirements. NRDP staff, agents, and appointees must be permitted to monitor performance and visit the project site. All final design plans must be reviewed and approved by NRDP before construction. Depending on the project scope, the NRDP may require prior approval of contracting procedures.

Grant recipients assume all liability for the projects and are responsible for ensuring that projects are performed as required in the grant agreement. Progress reports and financial reports are required. A final report is required when the project is complete.

Grant funds will typically be disbursed on a reimbursement basis for approved and documented expenditures. Up-front funding will be considered on a case by case basis. Any reduction in the scope of work may result in a corresponding grant reduction in grant funding.

PRE-APPLICATIONS (for future grant cycles monies)

This short form can be used for submittal of pre-applications. Submittal of a pre-application offers applicants the opportunity to obtain a non-binding opinion from the State on whether a particular conceptual proposal may be an appropriate project for funding out of the UCFRB Restoration Fund before going through the more time-consuming process of preparing a comprehensive proposal. **Due to time constraints, the State cannot provide pre-application determinations of proposals seeking Pilot Year 2000 grant monies.** Pre-applications for proposals seeking subsequent grant year funding can be submitted on a continuing basis.

Section 2 – Instructions for Completing Upper Clark Fork River Restoration Fund Grant Applications

This section outlines the 7 steps to follow in submitting a completed application for funding requests greater than $10,000. For funding requests $10,000 or less, applicants can submit an abbreviated application, the Short-Form. To request a Short-Form, contact NRDP at 406-444-0205 or download the form from the Department of Justice website at **www.doj.state.mt.us**.

In general, information submitted by the applicant after the due date for applications will not be considered unless such information is specifically requested by NRDP. Applicants are expected to inform NRDP during the application review process of any developments that would affect the viability of the proposed project. NRDP staff may contact the applicant to obtain omitted information, to clarify issues, or to verify information contained in the application. All applications are subject to public review.

UCFRB RESTORATION FUND APPLICATION CHECKLIST

To check for application completeness, be sure that each of the following 6 items are included in your application.

_____ **Step 1. An "Applicant Information and Project Summary Form"**

_____ **Step 2. A Project Abstract**

_____ **Step 3. Technical Narrative**

_____ **Step 4. Environmental and Human Health and Safety Impacts Narrative**
- **a. Environmental Impact Checklist**
- **b. Human Health and Safety Checklist**

_____ **Step 5. Criteria Statements**

_____ **Step 6. A Proposal Budget, including**
- _____ **a. A Budget Summary Form**
- _____ **b. Budget Detail Forms**
- _____ **c. A Budget Narrative**

Step 1. Applicant Information and Project Summary Form

1. **Name of Applicant(s)** _____

2. **Project Title** _____

3. **Type of Entity*** _____
(city, corporation, private individual, association, etc.)

(***Corporation** applicants are required to submit corporation information as follows: Articles of Incorporation, and Certificate of Good Standing. **Partnership** applicants are required to submit a Partnership Agreement and a list of the names of the Partners. **Limited Liability Company** applicants are required to submit Articles of Organization, a list of the members/managers, and Certificate of Good Standing. **Associations** are required to submit a list of members, Articles of Incorporation and Certificate of Organization. **Please attach these documents to this form.**)

4. **Description of Project Location** _____

_____

_____

5. **Injured Natural Resource(s) and/or Impaired Services to be Restored, Rehabilitated, Replaced or Equivalent Acquired through Project** _____

_____

_____

_____

_____

6. **Authorized Representative:** _____
(Name) (Title)
Mailing Address: _____
(Street/PO Box)
_____
(City/State/Zip) (Telephone)

Contact Person*: _____
(Name) (Title)
Mailing Address*: _____
(Street/PO Box)
_____
(City/State/Zip) (Telephone)

(*for Corporate, Partnership, L.L.C., or Cooperative Association applicants, list Registered Agent and Office for Service of Process)

7. **Proposed Funding Sources**

On the table below, enter the source and amount of all funding that may be used for this project. Indicate all potential sources of funds that may apply to this project even if you have not yet applied for the funds or have not yet received a commitment from the source.

Funding Source	Amount				
	Grant ($)	Loan ($)	Other ($)	Total ($)	Committed source?
A. UCFRB Restoration Fund					
B.					
C.					
D.					
E.					

8. **Estimated Total Project Cost $** _____

9. **Private (non-Governmental) Grant Applicant Financial Information**

a. Are there any lawsuits, judgments, or obligations pending for or against you? _____
b. Have you ever declared bankruptcy? _____
c. Are any of your tax returns delinquent or under dispute? _____
d. Any unpaid deficiencies? _____
e. Are you a party to a lawsuit? _____
f. Do you have any other contingent liabilities? _____
g. Do your current and deferred liabilities exceed the value of your assets? _____

Explain all <u>YES</u> answers in a statement attached to this form.

Certification for Individuals or Private Entities

I (We) the undersigned, have provided this financial information as part of my (our) application for a grant from the UCFRB Restoration Fund. I (We) certify that the statement is complete and accurate to the best of my (our) knowledge and I (we) authorize the State of Montana to investigate my credit worthiness and any of the matters described above.

Individual(s)

Name	Social Security No.	Signature	Date
Name	Social Security No.	Signature	Date

Social Security Numbers will be kept confidential.

Private Entities

Name of Authorizing Agent	Federal Tax ID No.	Signature	Date

10. Authorizing Statement

An authorized agent/agents representing the applicant must by his/her signature indicate that the application for funds and expenditure of matching funds, as represented, is officially authorized.

Grant Authorization

I hereby declare that the information included in and all attachments to this application are true, complete, and accurate to the best of my knowledge, and that the proposed project complies with all applicable state, local, and federal laws and regulations.

I further declare that, for _____(Project Sponsor), I am legally authorized to enter into a binding contract with the State of Montana to obtain funding if this application is approved. I understand that the Governor must authorize funding for this project.

Project Sponsor	Date
Authorized Representative (signature)	Title

Step 2. Proposal Abstract

Prepare a clear and concise description of your proposal and its benefits to restoration of natural resources injured and/or the services lost as a result of releases of hazardous substances by ARCO or its predecessors that were the subject of Montana v. ARCO. This proposal abstract **as submitted** will be used to inform reviewers and the public of the range of proposals submitted. Your abstract should consist of no more than 300 words.

On your own paper, use the following format for your abstract.

Proposal Abstract

Applicant Name: _____

Project Title: _____

Project Description and Benefits to Restoration:

Step 3. Technical Narrative

Describe the work to be done with the UCFRB Restoration Grant Funds and with any matching fund committed to the project. This description must provide sufficient detail to ensure that the project is technically feasible and will achieve its objectives. In addressing technical feasibility, the applicant will be providing information that constitutes the scope of work for a grant agreement.

Explain the existing situation and the problem your project addresses. Provide the goals and objectives of the project. Discuss the specific tasks that will be carried out through project implementation. **Use the following Outline for Technical Narrative on the following two pages** to organize your presentation and to ensure that nothing is omitted from your discussion.

Please use the following format in presenting your Technical Narrative on your own paper:

Technical Narrative

Applicant Name: _____

Project Title: _____

(text of Technical Narrative)

OUTLINE FOR TECHNICAL NARRATIVE

A. Discuss the project history and describe related work previously conducted.

1. What efforts have been made in the past to address the problem or achieve the proposed objective of this project?
2. What circumstances precipitated the need for the project?
3. Are there any other related facilities, programs, or other resources that exist in support of this project?

B. List the project goals and objectives.

1. What are the goals of this project, or the problems you intend to solve through implementation of this project?
2. What are the specific project objectives you plan to accomplish in order to achieve these goals?
3. What quantitative results, if any, will this project achieve?

C. Describe in chronological order the individual tasks or activities necessary to accomplish the work under each objective.

1. For construction projects, provide a specific description of the project implementation plan.
   a. Discuss each phase of project construction, including any planning or design activities that must be completed before initiating construction activities.
   b. Quantify the staffing time necessary to complete the project.
   c. Identify the contracted services necessary to complete the project.

2. For other projects, provide a specific description of the project implementation plan.
   a. Describe the overall approach to project implementation.
   b. Identify each of the project phases, and the specific tasks that make-up each project phase.
   c. Quantify the staffing time necessary to complete the project.
   d. Identify the contracted services necessary to complete the project.

D. Provide a project time schedule. The format of the project schedule may be either a list of activities, table, or flow chart. The schedule should provide the State with a time frame for the project from the starting date through completion. The first item on each schedule should be the expected status of the project at the beginning of the contract period. Tasks or activities should be listed in the expected completion sequence. The tasks that will be completed earliest should be listed first. If particular tasks must be completed prior to others, this should be indicated. For example, the following expected dates in the project schedule may be applicable to some proposals:

1. Expected submittal dates to obtain all required permits, licenses, and approvals;
2. Dates for advertising for bids and requests for proposals;
3. Contract award dates;
4. Dates that each task or activity will start and end; and
5. Project completion date.

E. Describe monitoring activities related to measuring project effectiveness.

1. How the project outcomes will be measured?
2. What monitoring information will be collected?
3. How will monitoring results be used to ensure the quality of work on the project?
4. Who is responsible for monitoring the project and compiling this information.

F. Describe the technical feasibility of your project and how it will accomplish the goals and objectives identified in the scope of work.

1. To what extent does the technical approach use well-known and accepted technologies/methodologies?
2. Has this approach been used, to your knowledge, to successfully address similar problems?
3. What are the certainties and uncertainties associated with any innovative technologies associated with your project – to what extent is the innovative technology sufficiently demonstrated and what further development is necessary for full-scale application?
4. Are there any other uncertainties in the proposal that require future resolution? Please discuss these unknowns. For example, describe any difficulties that may be encountered during construction.

G. Provide supporting technical documentation.

1. A summary of the natural features of the project area, such as soils, vegetation, and hydrology.
2. A list of references of any completed reports and studies pertinent to the project and the selected technical approach.
3. Copies of unpublished materials relevant to the technical feasibility of the project.
4. A topographic map or aerial photograph that shows the project location by sections, townships, and ranges (show titles on all maps, and include both a scale and a north arrow).

Step 4. Environmental and Human Health and Safety Narrative

All applicants must evaluate the proposal's potential impacts to the environment and human health and safety. Analysis of these potential impacts can alert applicants to considerations in the location, design, or construction of projects that will help to avoid potential adverse environmental impacts or expensive mitigation or construction costs.

Provide a narrative evaluation of the potential environmental impacts of the proposal. Use the checklists on the following pages as a guide in your consideration of these impacts. The criteria statement discussion should include direct and indirect adverse impacts that could arise from the project in the short-term or long-term, including those that involve resources that are not a part of the project.

A. Discuss in the narrative those items identified on the checklists where a potentially adverse impact will occur, where a permit or approval will be required, or where mitigation will be required.

B. Where a potentially adverse impact to the environment or human health and safety is projected, the applicant must provide the following:
   1. A description and analysis of any reasonable alternatives that would avoid the impact and a justification for the selected alternative;
   2. An evaluation of appropriate short and long-term measures to mitigate each potentially adverse impact and a discussion of the effects of those mitigation measures on the proposed project.

Instructions for Completing the Environmental and Human Health and Safety Checklists

Complete the attached Impacts Checklist for the proposed project. NRDP will review the comments and prepare its own evaluation to determine whether further information is required.

Five possibilities are listed on the form:

N – No Impact or Not Applicable to this project
B – Potentially Beneficial Effect
A – Potentially Adverse Impact
P – Agency Approval or Permits Required
M – Mitigation Action(s) Required

Space is provided next to each of the subject areas. Fill in each of the blanks using one of the letters in the key at the top of the page that characterizes the nature of the impacts. In some cases, it may be appropriate to indicate more than one possibility.

Environmental Impact Checklist (use this form)

Key Letters: **N** – No Impact or Not Applicable to this project; **B** – Potentially Beneficial Effect; **A** – Potentially Adverse Impact; **P** – Agency Approval or Permits Required; **M** – Mitigation Action(s) Required

Environmental Impacts	No Impact	Potentially Adverse	Potentially Beneficial	Permits/ Approval	Mitigation Required
1. Soil suitability					
2. Topographic constraints					
3. Geological constraints					
4. Air quality					
5. Groundwater resources and quality					
6. Surface water quality, quantity and distribution systems					
7. Floodplains and floodplain management					
8. Wetlands protection					
9. Agricultural lands, production, and farmland protection					
10. Terrestrial, avian, and aquatic species and habitats					
11. Vegetation quantity, quality and species					
12. Unique, threatened or endangered species or habitats					
13. Unique natural features					
14. Access to recreational activity, public lands, open space					
15. Historical and archeological sites aesthetics, visual quality					
16. Energy resources, consumption, and conservation					
17. Land use compatibility; Consistency with local ordinances, or solutions, or plans					

Human Health and Safety Checklist (use this form)

Key Letters: **N** – No Impact or Not Applicable to this project; **B** – Potentially Beneficial Effect; **A** – Potentially Adverse Impact; **P** – Agency Approval or Permits Required; **M** – Mitigation Action(s) Required

Human Health and Safety Impacts	**No Impact**	**Potentially Adverse**	**Potentially Beneficial**	**Permits/ Approval**	**Mitigation Required**
18. Human Health					
19. Nuisances (odor, dust, glare) (e.g. separation between housing and construction areas					
20. Noise					
21. Hazardous substance handling, transportation and disposal					
22. Public safety (e.g. police, site security)					
23. Displacement or relocation of business or residents					
24. Wastewater treatment, sewage system					
25. Storm water – surface drainage					
26. Community water supply					
27. Fire protection					
28. Transportation networks and traffic flow					

Comments: (use additional pages if necessary):

Step 5. Criteria Statements

Listed below are the project evaluation criteria set out in the *UCRFB Restoration Plan Procedures and Criteria* document. In order to promote a fair and thorough evaluation of grant proposals based on these criteria, the State requests that applicants address each applicable criterion individually. **For each criterion, please provide sufficient information about the proposed project to allow the State to evaluate your proposal as it relates to that specific criterion.** A format for submitting your Criteria Statements is provided below.

Appendix A provides detailed instructions on how to complete criteria statements. Not all of the Stage 2 criteria apply to all proposals and for two of the Stage 2 criteria, applicant response is optional. **BE SURE THAT YOU REFER TO APPENDIX A IN COMPLETING YOUR CRITERIA STATEMENTS.**

On your own paper, please follow this format and be sure to address each criterion that is applicable to your proposal:

Criteria Statements

Applicant Name: _____

Project Title: _____

1. (insert name of criterion): **[text]**

2. (insert name of criterion): **[text]**

(Continue format for all applicable criteria)

Minimum Qualifications Criteria: Five minimum qualification criteria are specified on page 4 of this booklet. Of those, two need to be addressed by applicants in a criteria statement:

- Pilot Year Priority
- Applicant Qualifications

Stage 1 Criteria: The "Stage 1 Criteria" are legal requirements the State will use to evaluate proposals. They are derived from the criteria set forth in federal natural resource damage assessment regulations. The Stage 1 Criteria that apply to all proposals are:

General Legal Criteria (apply to all proposals)

- Technical Feasibility (addressed in step 3)
- Relationship of Expected Costs to Expected Benefits
- Cost-effectiveness
- Adverse Environmental Impacts
- Human Health and Safety (addressed in step 4)
- Results of Response Actions (addressed in step 4)
- Recovery Period and Potential for Natural Recovery
- Applicable Policies and Laws
- Resources of Special Interest to the Tribes and DOI

Stage 2 Criteria: The "Stage 2 Criteria" reflect matters of special interest to the State of Montana and promote the State's goals and policies of restoring the natural resources of the UCFRB. The Stage 2 Criteria are:

General Policy Criteria (apply to all proposals)

- Project Location
- Actual Restoration of Injured Resources
- Relationship Between Service Loss and Service Restoration
- Project Beneficiaries and Collateral Benefits
- Public Support
- Matching Funds and Cost Sharing
- Ecosystem Considerations, Coordination and Integration (response optional)
- Normal Agency Functions (response optional)

In addition to the Stage 2 Criteria above that apply to all proposals, the following Stage 2 criteria apply to land acquisition or monitoring and scientific research projects.

Land Acquisition Criteria (apply only to proposals involving the acquisition of land or interests in land for State ownership)

- Desirability of Public Ownership
- Habitat Protection
- Spillover Benefits
- Public Access
- Price

Monitoring and Research Criteria (Apply only to proposals involving monitoring or scientific research)

- Overall Scientific Program
- Assistance with Restoration Planning

Step 6 Proposal Budget

Complete the **budget estimate** and **budget narrative**. Budgets should estimate costs as completely and accurately as possible. The budget summary form and budget detail forms include major expense categories. The information contained on this form will be used to negotiate a contract between the State and the applicant. Actual grant funding cannot exceed the amount authorized by the Governor. Construction projects should include a contingency expense of at least 10 percent of construction costs to cover unexpected expenses. An inflation contingency may be included as a project cost, and must be identified as such on the budget form. Account for any time lapses between project approval and funding so that an inflation contingency may ensure that funds are sufficient to complete the project activity. Include copies of cover letters for any funding applications you have submitted to other agencies, letters of inquiry and responses and budget documents that show any matching funds committed to the proposed project.

A. BUDGET ESTIMATE

Use the attached budget summary table and budget detail forms below to complete your budget estimate. Information regarding the following expense categories should be included in your budget estimate. **Submit both the budget summary form and backup budget detail forms in your applications. You may use substitute forms provided they provide equivalent detail on the following expense categories.**

1. **Salaries and Wages** – Identify each employee required to complete the project. List all participants by name and position, or by position only if not yet hired. List the estimated number of hours each employee will work and the hourly wage rate. Include in this category clerical, bookkeeping, and other support staff services.

2. **Employee Benefits** – Enter the employee benefits to be paid and the rate or method by which they were calculated.

3. **Contracted services** – Identify any services to be provided by others hired under contract for professional services or construction. This category includes, but is not limited to, electrical, plumbing, and construction expertise, labor, materials, equipment, data processing, printing, film developing, and laboratory testing. List each specific service to be performed and the wage rate associated with it. Construction service contracts should include at least a 10 percent contingency to cover unexpected expenses.

4. **Supplies and Materials** – List major office supplies and building materials necessary to prepare, conduct, or construct this project. These items are generally consumable commodities purchased for inventory or immediate use by the applicant and cost less than $250. List the costs of all major items.

5. **Communications** – Include telephone, postage, mailing, and advertising costs in this category.

6. **Travel** – List only costs for travel that is essential to conduct the project. Detail the expected travel destination, the purpose of the travel, the number of people traveling, and the number of trips to be made. Travel rates may not exceed the current state employee rates for meals, lodging, and mileage.

7. **Rent and Utilities** – List the terms and costs specific to the project that are associated with buying or renting office space, storage, computer rental, other office equipment use, additional project space requirements, and applicable utility expenses.

8. **Equipment** – Include in this category articles leased or purchased for use on the project by the applicant. These items generally are of a non-consumable nature and have an estimated life of more than one year and cost greater than $250. List all necessary items and their costs.

9. **Miscellaneous** – Identify any miscellaneous costs required to complete the project. List any other project costs, such as repairs or maintenance, that have not been addressed in other budget categories. The State will not pay interest on loans taken out to cover grant operating expenses.

10. **Indirect Costs** — Indirect costs that are not project specific are not eligible for grant funding. These are the general overhead costs that are incurred whether or not the project is implemented such as accounting, legal, personnel, corporate department expenses, general insurance, office rent, utilities, property taxes, telephone, etc. Indirect costs may be listed as matching funds.

B. BUDGET NARRATIVE

The budget narrative must clearly demonstrate that the project can be completed within the proposed budget. To accomplish this goal, address the following issues.

1. Provide a general discussion of the spending plan, and explain each budget item in relation to the total budget.
2. The budget narrative should clearly state the assumptions used to develop the proposed budget.
3. Include the sources of all cost estimates in the budget narrative.
4. Fully justify project expenditures reported on the budget forms.
5. Describe the basis for your computations.
6. Describe what contingencies exist for cost-overruns, such as construction contingencies.
7. Indicate what mechanisms of financial assurance such as letters of credit or performance bonds have been or will be obtained.

Additionally, identify all of your non-UCFRB Restoration Fund funding sources and describe your efforts toward securing those funding commitments. Please address the following issues:

1. If you applied to other funding agencies, give the date of your application, the date a funding decision is expected, and whether you requested a grant or a loan.
2. State how much money you will provide for the project, and describe your in-kind contributions.
3. If local community funds are from the private sector, fully describe your borrowing plans.
4. Include any other information that would help the State assess your financial commitment to project completion.
5. If the project will require funding beyond the period for which funds are requested, include a plan describing how subsequent funds will be obtained.

Please use the following format in presenting your Budget Narrative on your own paper:

Budget Narrative

Applicant Name: _____

Project Title: _____

[text]

PROJECT BUDGET SUMMARY FORM*

EXPENSE CATETORY	UCFRB RESTORATION FUND	APPLICANT CONTRIBUTION	OUTSIDE SOURCES**	TOTAL
1. SALARIES AND WAGES				
2. FRINGE BENEFITS				
3. CONTRACTED SERVICES				
4. SUPPLIES AND MATERIALS				
5. COMMUNICATIONS				
6. TRAVEL				
7. RENT AND UTILITIES				
8. EQUIPMENT				
9. MISCELLANEOUS				
TOTAL $				

*This table provides summary expense totals from the Budget Detail Forms that follow

**Clearly identify the outside sources of funds.

BUDGET DETAIL FORM

EXPENSE CATETORY	UCFRB RESTORATION FUND	APPLICANT CONTRIBUTION	OUTSIDE SOURCES**	TOTAL
SALARIES AND WAGES				
TOTAL SALARIES AND WAGES $				
FRINGE BENEFITS				
TOTAL FRINGE BENEFITS $				
CONTRACTED SERVICES				
TOTAL CONTRACTED SERVICES $				

**Clearly identify the outside sources of funds.

BUDGET DETAIL FORM (cont.)

EXPENSE CATETORY	UCFRB RESTORATION FUND	APPLICANT CONTRIBUTION	OUTSIDE SOURCES**	TOTAL
SUPPLIES AND MATERIALS				
TOTAL SUPPLIES AND MATERIALS $				
COMMUNICATIONS				
TOTAL COMMUNICATIONS $				
TRAVEL				

**Clearly identify the outside sources of funds.

BUDGET DETAIL FORM (cont.)

EXPENSE CATETORY	UCFRB RESTORATION FUND	APPLICANT CONTRIBUTION	OUTSIDE SOURCES**	TOTAL
RENT AND UTILITIES				
TOTAL RENT AND UTILITIES $				
EQUIPMENT				
TOTAL EQUIPMENT $				
MISCELLANEOUS				
TOTAL MISCELLANEOUS $				
ALL CATEGORIES GRAND TOTAL $				

**Clearly identify the outside sources of funds.

APPENDIX A – DEFINITIONS and DETAILED INSTRUCTIONS FOR COMPLETING CRITERIA STATEMENTS

DEFINITIONS

The short definitions that follow are intended to help applicants identify the types of projects that will restore, rehabilitate, replace, and/or acquire the equivalent of injured natural resources and/or lost services.

Natural Resources. "Natural resources" that may be addressed through UCFRB Restoration Fund projects include the land, surface water, ground water, aquatic life, wildlife and other resources that: 1) are owned by or held in trust by the State of Montana; 2) have been injured from exposure to or contact with hazardous substances generated by mining and mineral processing in the UCFRB conducted by ARCO and its predecessor, The Anaconda Company; and 3) were the subject of Montana v. ARCO lawsuit. A description of these natural resources is provided in Chapter 2 of the *UCFRB Restoration Plan Procedures and Criteria* document.

Services. "Services" are the physical and biological functions, including the human use of those functions, performed by the natural resource, or that would have been performed by the natural resource had it not been injured by the release of hazardous substances. A service provided by an injured natural resource, or that would have been provided absent the injury to the natural resource, may also be addressed through UCFRB Restoration Fund projects.

Injury. "Injury" to a natural resource is the measurable adverse change in the chemical or physical quality or the viability of a natural resource resulting from exposure to a discharge of a hazardous substance.

Baseline. "Baseline" refers to the condition of a natural resource and the services it provided that would have existed had the discharge of the hazardous substance not occurred.

Natural Recovery. "Natural recovery" of an injured resource is the process whereby the injured natural resource returns to baseline condition. The time period during which natural recovery occurs depends on many factors, including the extent of the injury, the persistence of the hazardous substance in the environment to which the natural resource is exposed, and the extent of human intervention. Human intervention may reduce or entirely eliminate the length of time for natural recovery of an injured natural resource.

Response Actions. "Response actions" are those measures undertaken by the U.S. Environmental Protection Agency or the State of Montana at contaminated sites that are deemed necessary to protect the public health or welfare or the environment from continued or further harm. Although response actions are not primarily designed to restore injured natural resources or services, they may have this effect to some extent.

Restoration. The term "restoration" is used in both a general sense and specific sense in this document. Used in a general sense, "restoration" generally refers to the four types of actions

authorized under federal law to address injuries to natural resources (i.e. restoration, rehabilitation, replacement, and acquisition of the equivalent natural resources.) Used in the specific sense, "restoration" refers to actions that operate directly on the injured resources and services to return them to baseline conditions or to accelerate the recovery process. For example, in a situation where numerous sources are contaminating groundwater, removing the most significant sources would lessen the injury and result in the groundwater's recovery, or "restoration," to baseline sooner than would otherwise occur.

Rehabilitation. Actions constituting "rehabilitation" attempt to return the injured resources and services to a state different than their baseline condition, but still beneficial to the environment and the public. For example, where injury to a conifer forest resulted in a loss of upland big game habitat, planting grasses and shrubs would create upland bird habitat while only beginning the process of restoring upland big game habitat.

Replacement. Actions constituting "replacement" seek to create or enhance resources and services equivalent or very similar to those that have been injured, but away from the immediate site of the injury. For example, where an injury to a trout fishery has occurred, improvements to a nearby stream would enhance its trout fishery and would, in effect, constitute "replacement" of the injured fishery.

Acquisition of Equivalent Resources. Actions constituting "acquisition of equivalent resources" involve acquiring unimpaired resources comparable to those that are injured. Acquisition of equivalent resources can hasten recovery or protect the injured natural resources. For example, acquiring healthy land adjacent to injured land can relieve pressure on the injured land and hasten its recovery. Or acquisition of equivalent resources may compensate the public for its diminished ability to use the injured resources. For example, although acquiring unimpaired land for public use does not restore the land that has been injured, it does make available for public use other land.

Detailed Instructions on How to Complete Criteria Statements

To assist you in preparing your criteria statements, the criteria which applicants are to address in their criteria statements are discussed below, and specific issues that should be addressed relevant to each criterion are listed. The issues discussed below are suggested to help you organize your statement but are not exclusive. Some overlap of issues may be encountered, and applicants may refer to other sections of the statement where appropriate to avoid duplication of effort. Additionally, depending on the type of proposal, some of the suggested issues for discussion may not be applicable to a particular proposal.

A few of the criteria require information that may not be readily available to applicants. The explanation of each criterion provided below distinguishes these few criteria from the majority of the criteria where applicants should be able to demonstrate how the criteria are met. For these few criteria, applicants should describe available pertinent information of which they are aware to assist the State in its evaluation of these criteria.

Not all of the Stage 2 criteria apply to all proposals and for two of the Stage 2 criteria, applicant response is optional. These distinctions are set out in the following criteria descriptions.

MINIMUM
QUALIFICATION CRITERIA

(apply to all proposals)

1. PILOT YEAR PRIORITY

During the Pilot Year 2000 Grant Cycle, only a limited number of projects will be funded. In this criteria statement, explain why your project should be funded in the Pilot Year 2000 Grant Cycle and should not wait for funding during subsequent years.

2. APPLICANT QUALIFICATIONS

In its screening for minimum qualifications, the State will evaluate whether the applicant and project staff have the ability, financial wherewithal and other qualifications necessary to undertake the projects. Financial wherewithal information is addressed in other portions of the applications. In this criteria statement, address your expertise in handling similar projects as that proposed. Briefly summarize the **relevant** the skills, qualifications, and experience of the individuals that will be undertaking the project.

STAGE 1 CRITERIA
General Legal Criteria
(apply to all proposals)

1. **TECHNICAL FEASIBILITY** (This criteria is addressed in the technical narrative; no additional response is required in the criteria statement.)

2. RELATIONSHIP OF EXPECTED COSTS TO EXPECTED BENEFITS

This criteria statement should provide information regarding whether a project's costs are commensurate with the benefits it provides. The State will evaluate all costs associated with the project, including costs other than those needed simply to implement the project, and the benefits that would result from a project. Application of this criterion is not a straight cost/benefit analysis, nor does it establish a cost-benefit ratio that is by definition unacceptable. **If cost and benefits of the project may not be quantified, provide a narrative discussion of the cost and benefits.**

A. Describe and, if possible, quantify the direct and indirect costs of the project.

B. Describe and, if possible, quantify the direct and indirect benefits of the project.

Benefits and costs of the project are "direct" if they accrue to a targeted group of people and/or the natural resources and services that are affected by the project. "Indirect" benefits and costs accrue to the general public and resources and services that are affected by the project but are not specifically targeted.

3. COST-EFFECTIVENESS

This statement should include information regarding whether a particular project accomplishes its goal in the least costly way possible compared to alternatives. In applying this criterion, the State will consider all the benefits and costs associated with a project compared to alternative solutions. The descriptions of each alternative do not have to be as detailed as the description of the proposed project, but enough information must be provided to demonstrate that the alternatives to the project were investigated and that the proposed project provides either greater benefits or similar benefits at a lower cost.

A. Describe the alternatives to the proposed project that were considered, including a discussion of the no action alternative.

B. To the extent possible, compare the benefits and costs of each of the alternatives and provide justification for the selection of the preferred alternative.

C. If the alternative selected does not provide the greatest net benefits of the alternatives analyzed, provide the reasons for the selection of this alternative.

4. ENVIRONMENTAL IMPACTS (This criteria is addressed in the environmental and human health and safety narrative; no additional response is required in the criteria statement.)

5. HUMAN HEALTH AND SAFETY IMPACTS (This criteria is addressed in the environmental and human health and safety narrative; no additional response is required in the criteria statement.)

6. RESULTS OF SUPERFUND RESPONSE ACTIONS

This statement should include a discussion of the results or anticipated results of Superfund response actions (defined on p. 2) underway, or anticipated, in the UCFRB relevant to the proposed project. Numerous response actions are ongoing and additional response actions are scheduled to begin in the next several years, continuing for many years into the future. Application of this criterion will require the State to assess at an adequate level of detail, given the inherent uncertainties associated with this task, what response actions will entail and to make projections as to their effects on resources and services. The State will evaluate what is necessary in the way of restoration of resources and services in light of ongoing and planned response actions and evaluate the degree of consistency between a project and response actions. Projects which duplicate or may duplicate the effects of a response action on natural resources or services will be disfavored.

Given the multiple response actions underway or anticipated and multiple entities involved in those response actions it may be difficult to address this criteria. Therefore, applicants are requested to provide readily available information they have on this criterion and the State will collect any additional information needed to evaluate this criterion.

A. Identify and describe any ongoing and planned response actions of which you are aware that affect or may affect the natural resources or services addressed by your proposal.

B. Describe how your proposal coordinates with ongoing or planned response actions of which you are aware.

   1. What steps are included in your proposal to account for ongoing or planned response actions?
   2. Does your proposal augment an ongoing or proposed response action?
   3. Will implementation of your proposal in any way require that ongoing or proposed response actions be altered?

7. RECOVERY PERIOD AND POTENTIAL FOR NATURAL RECOVERY

The applicant should evaluate whether the resource their proposal addresses can recover naturally (i.e. without human intervention) and estimate how long natural recovery would take. This analysis will help to place the project's benefits in perspective by comparing the length of time it will take for the resource to recover if the project were implemented with the length of time for natural recovery.

The State recognizes the difficulty some applicants may have in predicting the capability of and timeframe for natural recovery. Provide time ranges (e.g. 1-10 years vs. 10-50 years vs. 50 –100 years, or longer) and identify any uncertainties. If necessary, the State will supplement information provided by applicants.

A. Evaluate the potential for natural recovery of the natural resource addressed by your proposal.

B. Describe how your proposal would enhance the time frame for natural recovery.

8. APPLICABLE POLICIES, RULES AND LAWS

This criteria entails the State's evaluation of the degree to which the project is consistent with applicable policies of the State, local government, the federal government and Indian tribes; with applicable laws and rules; with consent decrees; and with the *UCFRB Restoration Plan Procedures and Criteria*. Because these requirements are extensive, applicants are required only to address the following items in this criteria statement:

A. Identify any permits that have been obtained and those that must be obtained to complete the project, and include pertinent dates.

B. Submit verification of deeds, easements, or right-of-way agreements that will be required to complete the project, or describe property access agreements that will be needed before the project can begin.

C. Discuss coordination with local entities.
   1. What efforts have been made to contact local governmental entities regarding the project?
   2. What specific measures will be taken to ensure that the project is coordinated with local governmental activities and complies with local governmental requirements?

D. Discuss how the proposal is affected by and is consistent (or inconsistent) with any other applicable laws and rules, policies, or consent decree requirements of which you are aware. If necessary, the State will supplement information provided by applicants.

9. RESOURCES OF SPECIAL INTEREST TO THE TRIBES AND DOI

Pursuant to a Memorandum of Agreement with the DOI and Tribes, the State is to pay particular attention to natural resources of special interest to the Tribes and/or DOI, including particular attention to natural resources of special environmental, recreational, commercial, cultural, historic, or religious significance to either the Tribes or the United States. This statement should include a discussion of any potential impacts the proposal may have on resources of special interest to the Tribes and the United States DOI. To assist the State in evaluation of this criterion, applicants are requested to identify any of these resources of special interest of which they are aware.

A. Describe any Tribal cultural resources and religious sites of which you are aware.
   1. What investigations have been undertaken to locate and identify Tribal cultural resources and religious sites that are located in the vicinity of the proposed site?
   2. Have you identified any Tribal cultural resources or religious sites located in the vicinity of your proposal?
   3. What measures are included in your proposal to account for Tribal cultural resources and religious sites in the vicinity of your proposal?

B. Describe any resources of special interest to the Tribes or DOI of which you are aware.
   1. What investigations have been undertaken to locate and identify any natural resources of special environmental, recreational, commercial, or historic significance that are located in the vicinity of the proposed site?
   2. Have you identified any natural resources of special environmental, recreational, commercial, or historic significance to the Tribes or DOI located in the vicinity of your proposal?
   3. What measures are included in your proposal to account for any natural resources of special environmental, recreational, commercial, or historic significance to the Tribes or DOI in the vicinity of your proposal?

GENERAL POLICY STAGE 2 CRITERIA

(apply to all proposals)

1. PROJECT LOCATION

The State will evaluate the degree to which restoration actions occur at or near the site of natural resource injury. In this criteria statement, describe the location of the project and the geographic area that will benefit from the project relative to the site of the natural resource injury. Projects within the site of injury or in close proximity may be given priority over projects distant from the site of injury. If you have included topographic maps or aerial photographs in response to previous questions, please refer to those attachments.

2. ACTUAL RESTORATION OF INJURED RESOURCES

This criteria statement should contain information sufficient for the State to determine whether and to what extent a project actually restores injured natural resources. Projects that restore the resources that were injured may be given priority over projects that replace, rehabilitate, or acquire the equivalent resources.

A. Describe what specific injured natural resources are addressed in the proposal.

B. Describe how and to what extent injured natural resources will be restored.

3. RELATIONSHIP BETWEEN SERVICE LOSS AND SERVICE RESTORATION

This criteria statement should contain information sufficient for the State to determine whether any connection exists between the services that a project seeks to provide or augment, and the services lost or impaired as a result of the injuries to natural resources for which the State claimed damages.

A. Describe what services were lost as a result of injury to the natural resources addressed by the proposal.

B. Describe what services are created or augmented through implementation of the proposal.

C. Describe how the services created or augmented by the proposal restore, rehabilitate, replace or represent the acquisition of equivalent services lost as a result of injury to the natural resource.

4. PROJECT BENEFICIARIES AND COLLATERAL BENEFITS

If the proposal creates or augments services lost as a result of injury to natural resources, describe in this criteria statement who and what will benefit from a return of lost services. In applying this criteria, the State may favor projects that benefit the user group originally harmed.

A. Describe how and to what degree the services created or augmented through the proposal benefit persons and/or other natural resources.

B. Describe any relationship between the persons or natural resources to be benefited through the proposal and persons or natural resources originally harmed by the loss of services due to natural resource injury.

7. MATCHING FUNDS AND COST SHARING

In this criteria statement, describe any matching funds and cost sharing that will be utilized to implement your proposal, including the progress that has been made to secure such funds. Refer to the Proposed Funding Sources Table in the Applicant Information and Project Summary Form (p. 8). In applying this criterion, proposals securing funding from other sources may receive a more favorable review than proposals without matching funds.

6. PUBLIC SUPPORT

Through public review and comment, the public will have a significant role in the UCFRB Restoration Fund grant selection process. In this criteria statement, provide information by which the State may preliminarily assess public support for your proposal.

A. Describe the type and level of public support.

B. Provide copies of any letters of public support.

7. ECOSYSTEM CONSIDERATIONS, COORDINATION AND INTEGRATION (applicant response optional)

Under this criterion, the State will examine the relationship between the proposal and overall resource conditions in the UCFRB. Integration with other ongoing or planned restoration, remediation, or other actions, considering the complex arrangement of interdependent ecological components of the UCFRB, is necessary to ensure that restoration projects completed one year do not interfere with or hinder previous restoration efforts. Given that this is the first year of project funding, the State recognizes that this may be difficult for applicants to determine at this time. Consequently, applicants are not required to submit a statement for this criterion. However, if you have information pertinent to this criteria, please provide it.

8. NORMAL GOVERNMENT FUNCTIONS (applicant response optional)

The UCFRB Restoration Fund will not be used to fund activities for which a government agency would normally be responsible or that would receive funding in the normal course of events. With this criterion, the State will evaluate whether a particular project would be implemented if recovered natural resource damages were not available. The UCFRB Restoration Fund may be used to augment funds normally available to government agencies if such cost sharing would result in implementation of a restoration project that would not otherwise occur through normal agency function. While applicants are not required to submit information for this criterion, submittal of any pertinent information is encouraged.

LAND ACQUISITION STAGE 2 CRITERIA (Only proposals which would result in the acquisition of land or interests in land (including conservation easements) for public ownership need to address the following five criteria.)

1. DESIRABILITY OF PUBLIC OWNERSHIP

Provide a statement setting forth the benefits associated with the aspects of your proposal that would result in land, or interests in land such as conservation easements, being publicly owned.

A. How would the public ownership interest to be acquired through the proposal benefit injured natural resources?

B. How would the public ownership interest to be acquired through the proposal provide services that have been lost or injured?

2. HABITAT PROTECTION

Provide a short statement regarding the value of property to be acquired for fish and wildlife habitat through the proposal.

A. What is the availability of habitat, similar to that to be provided through the proposal, in the immediate area of implementation of the proposal?

B. To what extent does the property to be acquired through the proposal support multiple species of fish and wildlife?

C. What is the quality of the habitat that would be acquired through implementation of the proposal?

D. Describe the quality of habitat provided by adjacent property and property in the vicinity of the property to be acquired through the proposal.

3. SPILLOVER BENEFITS

Provide a statement describing whether and to what degree land acquired through the proposal would benefit either an injured area or, more generally, a larger surrounding area that is not injured.

A. Would acquisition of the property through the proposal benefit an injured area?

B. Would acquisition of the property through the proposal benefit a larger surrounding area that is not injured?

C. Based on an assessment of adjacent property, and property in the vicinity of the proposal, would acquisition of the property benefit any area-sensitive species or expand habitat available as home range for area-sensitive species?

4. PUBLIC ACCESS

Describe whether and how access to public land would be facilitated through the proposal.

5. PRICE

Provide a short statement regarding the price of the property to be acquired through the proposal, attaching any appraisal documents obtained by the applicant.

MONITORING AND RESEARCH STAGE 2 CRITERIA
(Only proposals involving the funding of monitoring or research need to address the following two criteria.)

1. OVERALL SCIENTIFIC PROGRAM

Provide a short statement describing the coordination or integration of the proposed monitoring or research with other scientific work or knowledge relating to the restoration of natural resources in the UCFRB. Greater benefits can be achieved when monitoring or research can use and assist other projects.

2. ASSISTANCE WITH RESTORATION PLANNING

Provide a short statement regarding how the proposed monitoring or research will directly assist with future restoration efforts.